



Student Financial Services
 5400 Ramsey Street
 Fayetteville, NC 28311
 1.800.488.7110
financialaid@methodist.edu

2025-2026 Verification Worksheet V5 Independent

Your FAFSA was selected by the U.S. Department of Education for review in a process called “verification”. In this process, we are required by federal law to compare the information from your FAFSA with the information provided on this worksheet and with you and your spouse (if married) Federal Taxes. If there are differences between your FAFSA and the documents you’ve submitted, corrections may be needed. We cannot process your financial aid until verification has been completed.

Directions

- Complete this form.
- Submit this form and all documentation to Student Financial Services either in person or by mail.
We must have the original handwritten signatures. This worksheet CANNOT be emailed.
- For more information or questions, please email financialaid@methodist.edu

Section A: Student Information (Print Clearly)

Student Name: _____

Are you planning on living on campus or off campus? (select one): On Campus Off Campus

Section B: Student Family Size Information (Print Clearly)

List the people in your family in the chart below, please include:

- You and your spouse if married.
- You and/or your spouse’s children even if they do not live with you/spouse if you and your spouse will provide more than half of their support from July 1, 2025, through June 30, 2026
- Other people if they now live with you, if you provide more than half of their support and will continue to do so from July 1, 2025, through June 30, 2026

Full Name	Age	Relationship to Student
(EXAMPLE) Joe Smith	18	Self

Section C: Student's Tax Information (Print Clearly)

*Select either 1, 2, 3, or 4 and follow the directions.

1. ___ I (student) did file a 2023 Federal (IRS) Tax Return.

Did you use the IRS Data Direct Exchange to transfer your tax data directly from the IRS to the 2025-2026 FAFSA?

- Yes. (nothing else needed)
- No. (please submit one of the following)
 - A SIGNED copy of your 2023 Federal IRS Tax Return (1040) or
 - A copy of 2023 Federal Tax Return Transcript or
 - Update your FAFSA and use the Federal IRS Data Direct Exchange.

2. ___ I (student) did not file a 2023 Federal Tax Return but did earn income in 2023: however, I was not required to file a tax return.

- List all your employers, sources, and resources that supported you for 2023 and what you earned in the table below. Submit all W2 worksheets for each employer with this worksheet. *Sign and date below the table.

Employer/Sources/Resources in 2023	Amounts Earned in 2023

*Required Signature (student) _____

Date: _____

3. ___ I (student) was not employed in 2023 and had no income earned from work in 2023.

Required Signature (student) _____

Date: _____

4. ___ None of these apply to me.

Explanation:

Section D: Spouses Tax Information (Print Clearly) (Only complete this section if the student is married.)

*Select either 1, 2, 3, or 4 and follow the directions below each.

1. ___ I (spouse) did file a 2023 Federal (IRS) Tax Return.

- Did you use the IRS Data Direct Exchange to transfer your tax data directly from the IRS to the 2025-20256FAFSA?
- Yes. (nothing else needed)
- No. (please submit one of the following)
 - A SIGNED copy of your 2023 Federal IRS Tax Return (1040) or
 - A copy of 2023 Federal Tax Return Transcript or
 - Update the students FAFSA and use the Federal IRS Data Direct Exchange.

2. ___ I (spouse) did not file a 2023 Federal Tax Return but did earn income in 2023: however, I was not required to file a tax return.

- List all your employers, sources, and resources that supported you for 2023 and what you earned in the table below. Submit all W2 worksheets for each employer with this worksheet. *Sign and date below the table.

Employer/Sources/Resources in 2023	Amounts Earned in 2023

*Required Signature (spouse) _____

Date: _____

3. ___ I (spouse) was not employed in 2023 and had no income earned from work in 2023.

Required Signature (spouse) _____

Date: _____

4. ___ None of these apply to me.

Explanation:

Section E: If you or your spouse have any of the following Unusual Circumstances, please contact the office of financial Aid for further instructions.

- You or your spouse have been granted a filing extension by the IRS beyond the automatic six-month extension.
- You or your spouse filed an Amended IRS Tax return.
- You or your spouse were victims of IRS Tax-Identity theft.
- You or your spouse filed Non-IRS Income Tax returns.
- You or your spouse have income and are non-IRS tax filers.
- You or your spouse have tax information that cannot be located by the IRS.

Section F: The Statement of Identity and Educational Purposes (Signing w/ MU)

- The student must appear in person at Methodist University to verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID.
- In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

I certify that I, _____ (print student's name), am the individual signing this Statement of Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Methodist University for 2025-2026.

Student Signature: _____ Date: _____

As the authorizing official for Methodist University, the above-named student's signature and Identification were received and reviewed in my presence. A copy of unexpired valid government – issued photo ID is on file in the Office of Financial Aid.

MU Authorizing Officials Signature: _____ Date: _____

Type of Unexpired Government ID Presented: _____

Section G: The Statement of Identity and Educational Purposes (Signing w/ Notary)

- If the student is unable to appear in person at Methodist University to verify his or her identity, the student must provide MU:
 - A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport: and
 - The original Statement of Educational Purpose provided below must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

I certify that I, _____ (print student's name), am the individual signing this Statement of Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Methodist University for 2025-2026.

Student Signature: _____ Date: _____

Notary's Certificate of Acknowledgement

State of: _____

City/County of _____

_____ (signer's printed name) personally appeared before me,
_____ (notary's name) on _____ (date) and proved to me on basis of satisfactory evidence
of identification _____ (type of unexpired government-issued photo ID provided) to be the above-named
person who signed the forgoing instrument.

WITNESS my hand and official seal: _____

My commission expires on: _____



Official Seal

Section G: Certification and Signatures

- I certify that all of the information reported on the 2025-2026 Methodist University Verification Worksheet-V5 is complete and correct.
- By signing this worksheet, I also understand that this information may require Methodist University to make changes to the originally reported FAFSA data that resulted from the verification process.
- I understand that If I purposely give false or misleading information I may be fined, sent to prison, or both.

Student's Signature: _____ Date: _____

We must have the original handwritten signature. This worksheet CANNOT be emailed.